INTERNAL INSTRUCTIONS
for DFA Employee Master Data Form

Employee Master Data Form

If this document is being submitted for a CLIP transaction, please indicate so in the upper right corner of the form in the space provided.

Request Data

Employee Name
Enter the employee's actual name as it appears in their personnel record. Do not enter nicknames or name abbreviations.

Transaction Effective Date
Enter the date that this transaction will be effective.

Personnel Number
Enter the 8-digit personnel number. If this is a new hire, there will be no personnel number to enter. Leave blank for new hires, and the system will assign the number.

Business Area
Enter the agency code. This is a 4-digit number. For example, 0610 represents the Department of Finance & Administration. It is the old agency number with a 0 for the first digit.

Personnel Area
Enter the unique personnel area that this employee is assigned to. The personnel area is a combination of a 2-digit agency code and a 2-digit sequence number representing that agencies physical location. For example, the Department of Finance & Administration has several locations that are sequentially numbered. DFA's first physical location is indicated by FA01. See the previously distributed list of PAs.

Organization Unit
This is an 8-digit numerical designation of specific offices.

Action/Reason Data

Employee Action
Select the appropriate personnel action to be performed on the employee. Refer to the HR Coding Guide for a list of valid values.

Reason
Enter the proper reason for the selected action.

Position Number
If this action requires a new position number such as a new hire, or transfer, enter the position number that will be associated to this personnel action.

Employee Group
Enter the appropriate employee group designation for the employee. Refer to the HR Coding Guide for a list of valid values.

Employee Sub-group
Enter the appropriate employee sub-group designation for the employee. Refer to the HR Coding Guide for a list of valid values.

Position Number
Enter the position number that the employee should be assigned to.

Job Title
Enter the job title that describes the position the employee is filling. This is equivalent to the state classification such as Secretary II.

Class Code
Enter the class code that corresponds to the Job Title. For example a Secretary II is a K153.

Pay Grade
Enter the pay grade associated to the job title. For example a Secretary II, Code K153 is a grade 13.

Personal Data

Form of Address
Select Miss, Ms., Mrs., or Mr.   This is optional.
Last Name
Enter the employee's last name
First Name
Enter the employee's first name as they are legally known. Do not enter a nickname.
Middle Name
Enter the employee's middle name if applicable.
Suffix
Enter the employee's name suffix if applicable. Valid entries are: II, III, IV, Sr., or Jr.
Nickname/Known As (*optional*)
Enter the name by which the employee prefers to be called.
Gender
Select the employee's gender.
Nationality
Enter the employee's nationality. Most employees will be listed as "American-US".
Marital Status
Enter the employee's marital status. Valid values are: Single, Married, Widowed, Divorced, Separated, Unknown, or blank.
Birth Date
Enter the employee's birth date.
SSN
Enter the employee's social security number.

Family/Related Person Data

Spouse Last Name
Enter the last name of the spouse.
Spouse First Name
Enter the first name of the spouse.
Spouse Gender
Enter the gender of the spouse.
Spouse Birth Date
Enter the birth date of the spouse.
Spouse Address
Enter the address of the spouse.
Spouse SSN
Enter the social security number of the spouse. This information will be used by benefits if the employee chooses to provide spouse coverage.
Separation Date
If the spouse and employee have separated, it may be recorded here. This is optional.
Reference Personnel Number
If the spouse is also a state employee, you may optionally enter their AASIS personnel number.

Organizational Assignment

Personnel Sub-area
Enter the 4-digit personnel sub-area for this employee. Personnel Sub-Area is a 4-digit

alphanumeric code that indicates what type of leave and timekeeping rules are required for a given position. Refer to the HR Coding Guide for a list of valid values.

Percentage
Enter the percentage of time that the employee will spend in this position. Most employees are 100%.

Contract
Enter the expected hours that this employee will work while in this position. This field is used by Benefits Administration. Refer to the HR Coding Guide for a list of valid values.

Cost Center
Enter the 6-digit number of the cost center the employee/position is assigned to.

Personnel Administrator
Enter the agency personnel administrator that will be responsible for this employee. This should be someone in your office, not someone in DFA Human Resources.

Payroll Administrator
Enter the agency payroll administrator that will be responsible for this employee. This is the Payroll Officer in DFA Human Resources assigned to your division. If you do not know this information, leave blank.

Time Administrator
Enter the agency time administrator that will be responsible for this employee. This should be someone in your office, not someone in DFA Human Resources.

Benefits Administrator
Enter the agency benefits administrator that will be responsible for this employee. For all DFA employees, this will be Nina Rogers.

Date Specifications

Original Hire Date
Enter the date that the employee was *originally* hired into state employment if applicable. Otherwise, this will be the effective date of the hiring action.

Latest Hire Date
For those employees that have previous state employment, this field will reflect the date the employee was hired into the new position.

Career Service Date
For new employees this will be the effective date of hire. For employees with previous state service, this date must be calculated by Human Resources.

Leave Accrual Date
For new employees this will be the effective date of hire. For employees with previous state service, this date must be calculated by Human Resources.

Performance Evaluation Date
Enter the date that this employee should have their next performance evaluation. Starting July 1, 2001, this will be the same date as the CLIP Review Date.

Career Service Payment Date
This is the date that the employee’s Career Service Recognition Payment is made. It is either the employee’s former Increase Eligibility Date (IED) or the Career Service Date, whichever is deemed “more beneficial to the employee.” This date will be calculated by Human Resources, or set by AASIS.

Monitoring of Dates

End Probation Date
Enter the date that the probationary period will end for this employee.

Reminder Date
Enter the date that you would like a follow up notice generated.

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CLIP Review Date
This is the date the employee's CLIP Review *and* Performance Evaluation are due in Human Resources.
Reminder Date
Enter a date two months prior to the employee's CLIP Review date.

Additional Data

Ethnic Origin
Select the employees' ethnic origin. Valid values are: American Indian/Alaskan, White, Asian, Hispanic, Black.
Military Status
If applicable, indicate the employee's military status. Valid values are: Inactive, Active, Retired, Inactive Reserve, Reserve, On-call, Vietnam Veteran, Disabled Veteran
Medicare
Indicate if the employee is eligible for Medicare
EEO Exemption
Indicate if the employee is EEO exempt. This would occur if the employee has an exception to their classification.
Veteran Status
Indicate the employee veteran status. Valid values are: Special Disabled Veteran, Vietnam Era Veteran, Other Veteran, Non-Veteran
Disability Status
Indicate if this employee has a disability.
Disability Date
Enter the date of the determination of disability.

Employee Business Address

Enter the address where the employee works. This is the agency physical address.

Employee Personal Address

Enter the employee's residence address.

Residence Status

Residence Status
Indicate whether this employee is a Citizen, Non-citizen, or Non-resident Alien.

Personal Identification (Optional on form; however, I-9 form & IDs must be on file)

ID Type
Select one of the valid forms of identification from the HR Coding Guide.
Issuing Authority
Enter the name of the government agency that issued the employee's personal identification.
ID Number
Enter the ID number of the document. In most cases this will be a driver's license.
Data Issued
Enter the date that the identification document was issued to the employee.
Expiration Date
Enter the date that the identification document will expire.

Employment Verification (Optional on form; however, I-9 form & IDs must be on file)

Work Permit
Select one of the valid work permit types from the HR Coding Guide.

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Issuing Authority
Enter the name of the government agency that issued the employee’s work permit.

Work Permit #
Enter the ID number of the document. In most cases this will be a driver’s license.

Date Issued
Enter the date that the identification document was issued to the employee.

Expiration Date
Enter the date that the identification document will expire.

Planned Working Time

Employment Percentage
Enter the percent of time that this employee will work. If you want an employee's planned working time to be different to that determined by the work schedule rule (especially when reducing planned working time for part-time employees), enter the percentage, in relation to a full-time employee, of planned working time that the employee must work.

Work Schedule Rule
Enter the work schedule that this employee will follow. Refer to the HR Coding Guide for a list of valid values.

Time Management Status
If this employee is subject to time evaluation, enter the appropriate time evaluation method. Valid values are: 0-No Time Evaluation, 1-Time Evaluation of Actual Times, 2-PDC Time Evaluation, 8-External Services, 9-Time Evaluation of Planned Times, Time Evaluation for Quota Only

Working Week
The working week defines a sequence of days that repeats itself on a regular basis and is used in time management to calculate overtime. Refer to the HR Coding Guide for a list of valid values.

Part-time Employee
Indicate whether this employee is working part-time. Select this option if you want to reduce the planned working time of an existing full-time work schedule rule to the percentage specified in the Employment percent field. Also select this option if you have created a special work schedule rule for part-time employees. You can then use the part-time status of these employees as a criterion in statistical queries.

Basic Pay

Reason
Enter the appropriate reason for changing the employee’s salary. Refer to the HR Coding Guide for a list of valid values.

Hourly Rate
Enter the hourly rate for the employee (subject to verification in Human Resources).

Annual Salary
Enter the annual salary for the employee.

Wage Type
Enter the wage type for the selected pay entry. Refer to the HR Coding Guide for a list of valid values.

Tax Data

Residence Tax Area
Enter the employee’s residence tax area. By default, this will be “Federal”. This is the employee’s residence for tax purposes. It is used to derive the tax authorities which will levy taxes that apply to residents.

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Unemployment State
Unemployment state information is used for the payment of Unemployment Insurance for each employee. This information is also used to provide statistical information to unemployment authorities requiring multiple work site reports. By default, this will be "Arkansas".

Worksite
Optional. This field is only used by those agencies that wish to maintain and report on employees by worksite. The personnel area field is equivalent to agency and location and may support a similar type of reporting.

State Withholding

Filing Status
Indicate the appropriate filing status for the employee. Valid values are: Single, Married, Head of Household, or Married Joint Claiming All.

Allowances
Enter the number of allowances claimed by the employee and/or spouse.

Dependent Allowances
Enter the number of child allowances claimed by the employee.

Additional State Tax Withholding Amount
Enter the additional amount to be withheld, at the employee's request, for the payment of taxes.

Tax Exempt Indicator
Indicate if this employee is exempt from taxation. By default, the employee is subject to both taxation and reporting. If you have an employee who is both exempt from certain taxes and whose earnings should not be reported, such as a foreign national, enter a "Y".

Federal Withholding

Filing Status
Indicate the appropriate filing status for the employee. Valid values are: Single, Married, Head of Household, or Married Joint Claiming All.

Allowances
Enter the TOTAL number of allowances claimed by the employee. For example if the employee was filing Single, claiming 1 allowance and 2 child dependents, enter a 3 in this field.

Federal Tax Exempt Indicator
Indicate if this employee is exempt from taxation. By default, the employee is subject to both taxation and reporting. If you have an employee who is both exempt from certain taxes and whose earnings should not be reported, such as a foreign national, enter a "Y".

Additional Federal Tax Withholding Amount
Enter the additional amount to be withheld, at the employee's request, for the payment of taxes.

EIC Status
Enter the Earned Income Credit status as indicated on the employee's W5 form. Valid values are: 0-Not applicable, 1-Single or married, spouse not filing W5, or 2-Married, both spouses filing form W5

Authorizations

Submitting Office Contact
The person completing the master data form should sign and indicate his/her office phone number. This person will be contacted in case of questions on or problems with the master data form.

Approvals
The employee supervisor must approve and date the request. The appropriate Deputy Director or Assistant Commissioner must also approve and date the form for all transactions affecting pay, including hires and terminations.